

3 July 1969

OFFICE OF PERSONNEL MEMORANDUM NO. 20-50-4

SUBJECT : Responsibility for Retirement Processing

RESCISSION: OPM 20-50-1, dated 3 May 1968

1. This memorandum provides information and guidance regarding various aspects of the Agency retirement program and the processing of retirement matters.

2. The Retirement Affairs Division (RAD), under the Deputy Director of Personnel for Special Programs, has the following functional responsibilities:

a. Office of the Chief

(1) Review and monitor, on a continuous basis, current retirement assistance programs and develop plans and procedures to improve the system.

(2) Provide policy guidance and recommendations to the Director of Personnel on all aspects of the retirement program.

(3) Maintain liaison with the Career Services and managerial components of the Agency to ensure coordinated and effective implementation of retirement program policies.

(4) Prepare seminar presentations on retirement, estate planning and other selected and related subjects.

(5) Maintain, at selected locations, reading rooms of literature, on retirement matters.

b. Retirement Counseling Branch (RCB)

(1) Serve as the initial contact point for retirement counseling of prospective retirees.

Group 1
Excluded from Automatic
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(2) Provide personal counseling services to employees seeking assistance and advice in connection with general retirement planning.

(3) Maintain liaison with the various Career Services in regard to matters pertaining to retirement of employees.

(4) Conduct follow-up contact with retirees six months after their retirement.

c. Retirement Operations Branch (ROB)

(1) Provide technical information and counseling service on options available in connection with all aspects of retirement.

(2) Verify records of civilian and military service.

(3) Compute annuities for prospective retirees.

(4) Prepare and process retirement applications and associated papers.

(5) Prepare and process purchase of service credit applications.

(6) Obtain retirement medallions, certificates and commendatory letters.

(7) Provide secretariate services for the CIA Retirement Board.

(8) Administer participation and review phases under the CIA Retirement and Disability System.

(9) Provide post-retirement services to annuitants and survivors of retirees under the CIA Retirement and Disability System.

(10) Maintain liaison with the Civil Service Commission.

d. External Employment Assistance Branch (EEAB)

(1) Provide guidance to individuals in the preparation of their personal history summaries and resumes.

(2) Counsel and assist employees in planning job search efforts, techniques of application and job interviews.

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(3) Provide job leads to individuals whenever such information is available and corresponds to their qualifications.

(4) Furnish information and guidance regarding application for U. S. Government employment (both non-status direct hire agencies and through Civil Service examinations).

(5) Respond to employer inquiries requesting confirmation of Agency employment and other information on former Agency employees.

3. There is assigned to RAD, from each Directorate, a senior officer who serves as the Retirement Counselor for that Directorate. Each such officer is the initial contact in RAD for all persons from his Directorate who are planning their retirements or who are seeking information on retirement. Each such officer also serves as the continuing contact on subsequent general retirement matters and keeps himself knowledgeable of all aspects of an individual retiree's processing by constant liaison with EEAB and ROB. Personnel officers are requested, therefore, to refer employees seeking retirement information to their respective counselors. The counselors responsible for the Science and Technology Directorate, the Intelligence Directorate, Support Services, and Clandestine Service can all be contacted on extension

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Robert S. Wattles
Director of Personnel

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